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Policy and Practice for JCALS Retail Operations

Wright-Patterson
AFB

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Introduction

- Review USAF TO system Policy
 - ◆ TOs, TODOs and TM Accounts
 - TO Distribution System Operations
 - ◆ JCALS Interim Practices and Procedures
 - ◆ Lead TODO / JCALS Functional Admin (FA)
 - TO Improvement System Operations
 - ◆ Current practice – JCALS issues & impacts
 - JCALS Roles & Privs Policy & Practice
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TO System Policy

- AF Policy (AFPD 21-3)
 - ◆ Use TOs for safe and effective operation and maintenance of AF equipment
 - ◆ Field and use up-to-date (accurate and current) TOs
- AF Maintenance Management (AF and MAJCOM 21-series Instructions)
 - ◆ Maintenance Officer: Ensure accomplishment of administrative functions required by all unit maintenance flights
 - ◆ Quality Assurance (QA) function: Focal point for oversight of technical activities



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TO Distribution System Retail Operations

- TO 00-5-2 establishes TO Distribution Office as responsible to provide TO administration services for base / unit / activity
 - ◆ Unit / Activity TODO – standard type
 - Established and assigned by Maint. Supervision
 - ◆ Base TODO – standard type
 - Established and assigned by installation Commander
 - Provide TO administration services to site activities
 - Require \leq 100 TOs
 - Not already serviced by a unit or activity TODO
 - ◆ Special Purpose TODO types
 - Contactor, JNWPS, FMS and JMEM



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Standard TODO Purpose & Policy

- Consistent with AF and MAJCOM policy
 - ◆ Carries out base/unit/activity TO distribution administrative functions
 - ◆ Established using AFTO Form 43
 - Customer account code assigned for TODO to conduct TO distribution business
 - ◆ G022 – TODO (address) code
 - ◆ JCALS – TM Account Address code
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TODO Vs. TM Account Address Code

- JCALS TM Account Address code vs. TODO Code to transact business
- Legacy practice (G022) TODO code
 - ◆ Centrally assigned and managed
 - ◆ Retained after JCALS conversion as Org Identifier
- JCALS practice
 - ◆ Capability to locally assign / manage TM Account address codes
 - ◆ TODO code no longer assigned
 - JCALS SA assigns w/Lead TODO/JCALS FA coordination
 - JCALS user with TM Account POC role can manage



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Lead TODO / JCALS FA

- JCALS Functional Administrator (FA)
 - ◆ Commensurate with Lead TODO responsibility
 - ◆ Delegated by unit/activity TODO approving agency
 - ◆ Base TODO or single unit/activity TODO
 - ◆ Consistent with draft AFI 21-101/21-303
 - TO business process and JCALS system SME:
Focal point for
 - ◆ Resolution of unit/activity TO distribution and quality problems
 - ◆ Use JCALS by unit personnel to accomplish unit TO business
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Interim Practice for JCALS

- Establish new base/unit/activity TODO (local TM Account)
 - ◆ AFTO Form 43 to initially establish TODO and assign TM Account address locally
 - ◆ Forward signed AFTO 43 to Lead TODO/JCALS FA
 - Assign TM Account address locally
 - ◆ FA coordinates with JCALS SA
 - Establish TODO's TM Account address
 - Set up preliminary TODO/TM Account information
 - Assign corresponding JCALS TM Account POC role
 - Use JCALS to manage TM Account operations
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Interim Practice for JCALS

- Maintain existing TM Account w/legacy OC-TODO code
 - ◆ Follow current TO 00-5-2 practice
 - Send updated AFTO Forms 43 to OC-ALC/TILUB
 - ◆ Consider migration to local TM Account (no TODO code)
 - OC-ALC/TILUB manages TODO / TM Account information in JCALS
 - Use JCALS to manage TM Account operations
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Interim Practice for JCALS

- Manage TM Account operations
 - ◆ Use JCALS to establish ID, order and track order status and run TM Account reports
 - ◆ Use ATOMS (or other tool) to manage receipt and distribution of TOs and distribution to sub-accounts

NOTE: All TODOs have at least one sub-account for purpose of managing receipt and distribution of TOs



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Migrate TODO or TODA to Local TM Account

- Decision of TODO approving agency
 - ◆ Recommendation of unit/activity lead TODO/JCALs FA
 - Must consider impact to unit effectiveness
 - ◆ TODA becomes TODO - AFTO Form 43 required
- Advantages:
 - ◆ Can update TM Account information directly
 - ◆ In sync with TM Account redesign (SWP3.3)
- Disadvantages:
 - ◆ difficult to complete for large TODO/TODA
 - ◆ Still limited TM Account operations until SWP 3.3



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Migrate TODO or TODA to Local TM Account

Note: Not recommended until delete TM Account operational capability confirmed

1. Establish new (local) TM Account address
2. Move TODO TM Account ID to Local TM Account
 - ◆ Use JCALS to establish ID for new TM Account
3. Submit AFTO 43 to cancel old OC-TODO TM Account



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Special Purpose TODO Purpose and Policy

- Special Purpose
 - ◆ Central control and management
 - MAJCOM Functional / ACO
 - OC-ALC/TILUB
 - ◆ JMEM, FMS and contractor
 - Customer interface – non-JCALS
 - Policy
 - ◆ Generally will conform to current central control practices
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TO Improvement Process

- Current practice - governed by TO 00-5-1
 - ◆ Initiate:
 - Initiator and supervisor document TO deficiency and recommended improvement - digital form
 - ◆ Review:
 - Product Improvement Manager (PIM) tracks review and evaluation process
 - Directs review: forwards to MAJCOM CCP or TO Manager
 - ◆ Evaluate:
 - TO manager controls evaluation process
 - Equipment Specialist evaluates
 - Approves or disapproves recommendation
 - Coordinates TO update with TO Manager
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TO Improvement Process

■ Business Practice using JCALS

◆ Initiate:

- TO user and supervisor create Recommended Change (Rec Chg) – digital AFTO Form 22
- Forward (e-mail) to responsible PIM (JCALS user)

◆ Review:

- PIM completes necessary Rec Chg screens and routes for review using JCALS workflow process
 - Last reviewing activity (PIM or Command Control Point as required) 'submits' to TO Manager using JCALS
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TO Improvement Process

- Business Practice using JCALS
 - ◆ Evaluation:
 - TO Manager routes to responsible ES/TCM for evaluation using JCALS if possible
 - ES/TCM approves/disapproves and documents using JCALS if possible
 - Advantages
 - ◆ Accountability and improved cycle time
 - ◆ Standardizes process for AF
 - Disadvantages
 - ◆ Process change difficult
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TO Improvement Process

- JCALS issues and impacts
 - ◆ Using JCALS Recommended Change Workflow for review and submission of TO deficiency report / recommended change
 - ◆ Reviewing activities not JCALS users
 - Requires manual workaround to complete
 - ◆ Evaluators not using JCALS or not JCALS users
 - Overall process deteriorates – visibility lost
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JCALs System Policy and Practice

- JCALs Role Administration Policy
 - ◆ Support standard AF business practice
 - ◆ Improve system efficiency and to effectively administer the system
 - ◆ Limit potential to assign role and/or priv. to unqualified user
 - Policy points
 - ◆ Specified roles assigned to qualified users only
 - ◆ Specify OPR and responsibilities
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JCALS System Policy and Practice

- JCALS Role Administration Practice
 - ◆ Specific guidance for assigning and modifying managed Roles
 - ◆ Additional roles may be assigned to users based upon local need (coordination with FA and SA)
 - ◆ Modifying JCALS Role Privilege sets not authorized
 - Documenting JCALS role policy and practice
 - ◆ Policy: AFI 21- series
 - ◆ Practice: TO 00-5- series
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Future Efforts

- Document interim practices and procedures
 - ◆ How best?
 - Determine future role of AFTO Form 43 in JCALS
 - Consider new policy:
 - ◆ TM Account required for TO library file
 - TO library file: one/more TOs to accomplish mission
 - ◆ Improve process Review as part of Evaluate
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Summary

- Review USAF TO System policy
 - TO Distribution System Operations
 - TO Improvement System Operations
 - JCALS Roles & Privs Policy & Practice
 - Open Discussion of Issues
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Open Discussion



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Backup AF Policy (1)

AF Maintenance Management Policy

AFI 21-101 (URL <http://afpubs.hq.af.mil/orgs.asp?type=pubs>)

The Squadron Maintenance Officer and/or the Maintenance Supervisor/Supintendent play pivotal roles in the unit's effort to improve maintenance quality. They must ensure supervisors and technicians participate in reviewing maintenance processes. Without aggressive involvement from maintenance supervision, the unit quality assessment program will not be effective. The Squadron Maintenance Officer/Maintenance Supervisor/Supintendent:

5.4.3.1. Ensure accomplishment of administrative functions required by all unit maintenance flights, including but not limited to: maintaining currency of prescribed technical data and procedural guidance; and collection of data required to support the unit assessment program.

5.4.3.2. Review corrective actions recommended for problems detected as a result of process reviews.

5.4.3.3. Work with Quality Assurance to facilitate process reviews.

5.4.3.4. Recommend areas for process reviews to Quality Assurance.



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Backup AF Policy (2)

AF Maintenance Management Policy

AFI 21-101 (URL <http://afpubs.hq.af.mil/orgs.asp?type=pubs>)

5.4.5. Quality Assurance. **Quality Assurance is the focal point for oversight of technical activities.** It administers the overall group assessment program, manages the weight and balance program, controls one-time inspections, coordinates functional check flights, houses the wing's Technical Order Distribution Office (TODO), and manages the Wing's Product Improvement Program ...

5.4.5.1. Group Assessment Program. Maintenance quality is the responsibility of every supervisor and technician assigned to the unit. **Quality Assurance** provides administration for the overall assessment program. It **serves as a source of quality techniques and assists maintainers in initiating process improvements.** MAJCOMs develop specific procedures for their Quality Assessment Program. Personnel assigned to administer the assessment program should be trained in techniques used to assess, track, analyze, and revise maintenance processes. These techniques include statistics, quality tools, and team facilitation. Responsibilities include:



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Backup MAJCOM Policy

HQ AMC Maintenance Policy

AMCI 21-101

LG Group Commander

3.3.18.16. Maintenance technical (tech) orders (TO). QA's TODO publishes an OI for TODO matters (see paragraph **4.26.2.**). This OI identifies TODO locations and ensures unit TOs are man-aged according to AFPD 21-3, *Technical Orders*, and 00-5-series TOs. Ensures TO changes are directed to QA (see **Chapter 4**).

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Squadron Commander:

3.5.10. Manage mobility and training programs to ensure integration with the group/wing.
